

**COUNTY OF SAN DIEGO – DEPARTMENT OF PURCHASING AND CONTRACTING**  
**CONTRACT NO. 544430 AMENDMENT NO. 7**

To **Home Start, Inc.** Pursuant to the contract changes clause, you are directed to make the changes described herein to the Contract or do the following described work not included in the previous agreed on Statement of Work.

Title of Contract: **Family Self-Sufficiency Services – East Region**

Effective Date: **July 1, 2015**

**Description of Contract Change(s) and/or Work to Be Done:**

This amendment revises language in the Statement of Work (Exhibits A and A1), Exhibit C and Exhibit C1. The revised amendment includes:

**1. Exhibit A – Statement of Work**

**1. Revise Section 1. (Scope of Work/Purpose), First Paragraph, to read as follows:**

Contractor shall implement a regional Family Self-Sufficiency (FSS) Program for individuals and families who fall at or below the 100% federal poverty level (FPL) guidelines and/or are recipients of any of the following: CalWORKs, CalFresh or Federal SSI. The FSS Program enables individuals and families to achieve and sustain self-sufficiency by overcoming barriers to employment, enhancing employment and income, and promoting behaviors that lead to self-reliance.

**2. Revise Section 4.1 (Target Population), First Paragraph, to read as follows:**

Contractor shall provide the services described herein to individuals and families whose income is at or below 100% of the federal poverty level and/or are recipients of any of the following: CalWORKs, CalFresh, or Federal SSI. The current CSBG poverty guidelines can be found on the California Department of Community Services and Development website <http://www.csd.ca.gov>.

**3. Revise Section 7.1 (Eligibility Determination:), First Paragraph, to read as follows (renumbers remaining section):**

**7.1. Eligibility Determination:** Contractor shall verify the service eligibility of all prospective low-income families in accordance with CSBG as determined below:

**Second Paragraph, First Sentence, to read as follows:**

- CSBG: clients served under the CSBG program shall be at or below 100% of the Federal Poverty Levels (FPL), and/or are recipients of any of the following: CalWORKs, CalFresh or Federal SSI.

**4. Revise Section 7.2. (Family Self-Sufficiency Services) updating the Community Action Plan date to 2014-2015.**

**5. Revise Section 7.9. (Shelter Services that result in a bed night) to read in its' entirety as follows:**

**7.9.** Shelter Services that result in a bed night: Contractor shall provide shelter services using a community collaborative approach as the core infrastructure to their service delivery model. Shelter services can be achieved in two different ways:

**7.9.1. Hotel Voucher Program**

**7.9.1.1.** Contractor shall accept referrals for shelter services from 2-1-1 San Diego and/or work with other partner agencies when administering the Hotel Motel Voucher program. Referrals coming from 2-1-1 or partner agencies for the Hotel Voucher program shall be administered as defined in the agreed upon Hotel Voucher Program Design and Hotel Voucher Criteria documents and may include, but is not limited to the following activities.

- a. Ensuring that priority is given to homeless families with minor children, seniors, pregnant women at risk of complications with childbirth, and individuals with disabilities. Non-priority individuals and families can be served when priority individuals and families have received services.
- b. If not eligible for the Hotel Voucher program, make reasonable efforts to arrange other shelter options for families and individuals in need of shelter during the coldest part of the year (generally the months of November through December and January through April).

- c. Assist participating families to find permanent housing when possible. Housing for disabled persons shall comply with ADA and Title 24 of the California Administrative Code.
- d. Establish agreements with emergency and transitional housing agencies, to leverage services that further enhance homeless services to clients.
- e. Issue payment for hotel vouchers distributed within contractor's region to Hotels with signed Hotel agreements and forward to the County Hotel invoices and original paid vouchers on a monthly basis.
- f. Refer CalWORKs clients who are in need of shelter to the CalWORKs Homeless Assistance program, as the primary option prior to referring the client to the Hotel voucher program.

#### **7.9.1.2. Shelter Referrals**

- 7.9.1.2.1.** In order to submit a request for payment for the "Shelter Referral" pay point, contractor shall ensure that homeless clients enrolled in the FSS program receive a referral for shelter that leads to a bed night when the family or individuals are not eligible for the County's Hotel Voucher program.

Contractor shall ensure the following activities are completed as part of implementing the referral process:

- a. Develop and maintain working relationships with local emergency and transitional shelter programs serving families and singles.
- b. Make referrals to homeless clients that may not be otherwise eligible to a Hotel Voucher and ensure a bed night(s) is secured.
- c. For CalWORKs families with pending or active cases, refer to the CalWORKs (CW) Homeless Assistance program for temporary and/or permanent housing.  
**Note:** The CW Homeless Assistance may also be available for families at risk of being homeless.
- d. Maintain on-going, open communication with CalWORKs staff after referrals are made to ensure coordination of client services.

#### **7.9.2. Ensure that case files are maintained for all persons receiving shelter services.**

### **2. Exhibit A1 – Statement of Work**

- 1. Modify Section 3.2.1.3.2., second paragraph change 80% to 100%.**

### **3. Exhibit C – Payment Schedule**

- 1. Change dates from 2014 to 2015.**
- 2. Decrease Item 10, Shelter Services Voucher funding dollars, from CY2014 amount of \$44,250 to CY2015 amount of \$29,250.**
- 3. Remove Exhibit C2 Funding Dollars, Contract period ended 9/30/2014.**
- 4. Decrease Exhibit C Funding Total from CY2014 amount of \$305,853, to CY2015 amount of \$290,853.**

### **4. Exhibit C1 – Payment Schedule and Budget**

- 1. Change Sections 2.1, 2.2, and Contract Budget – Table 2. Change dates from 2014 to 2015.**
- 2. Remove Section 2.3 Contract period ended 9/30/2014.**
- 3. Remove Contract Budget –Table 3, contract period ended 9/30/2014.**

All other Terms and Conditions remain in effect.

IN WITNESS WHEREOF, County and Contractor have executed this Amendment effective as of the date first set forth above.

We, the undersigned Contractor, have given careful consideration to the change proposed and hereby agree, if this proposed change is approved, that we will provide all equipment, furnish all materials, except as may otherwise be noted above, and perform all services necessary for the work specified herein, and will accept as full payment **\$371,248** for option year two (CY 2015), **\$351,149** for option year three (CY 2016), **\$290,853** for option year four (CY 2017).

Cumulative Contract Total Price is: **\$1,677,841**

By: \_\_\_\_\_

Laura Mustari, Chief Executive Officer  
Home Start, Inc.

Date: \_\_\_\_\_

6/19/15

**THIS AMENDMENT IS NOT VALID UNLESS APPROVED  
BY THE DIRECTOR, DEPARTMENT OF PURCHASING  
AND CONTRACTING.**

Department Review and Recommended Approval:

By: \_\_\_\_\_

Juana Dueñas, Program Manager  
Community Action Partnership  
Health and Human Services Agency

Date: \_\_\_\_\_

6/19/15

**APPROVED:**

By: \_\_\_\_\_

DEBORAH ARNOLD, Contracting Officer  
Department of Purchasing and Contracting

Date: \_\_\_\_\_

7-1-15

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**County of San Diego, Health and Human Services, Community Action Partnership**  
**Agreement with Home Start, Inc. for Family Self-Sufficiency Services (FSS),**  
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**1. Scope of Work/Purpose.**

Contractor shall implement a regional Family Self-Sufficiency (FSS) Program for individuals and families who fall at or below the 100% federal poverty level (FPL) guidelines and/or are recipients of any of the following: CalWORKs, CalFresh or Federal SSI. The FSS Program enables individuals and families to achieve and sustain self-sufficiency by overcoming barriers to employment, enhancing employment and income, and promoting behaviors that lead to self-reliance.

Contractor shall maintain a program design to provide the following services:

- Job readiness, development, coaching, and placement;
- Earned Income Tax Credit (EITC) component to assist participants with filing free tax returns; Asset Building activities that will include financial education services all inclusive;
- Low or no-cost health insurance outreach and referral assistance, including assistance with completing applications for Medi-Cal;
- Emergency shelter services and access to nutritious food and assistance with completing the CalFresh application.
- Nutrition education and services (reference Exhibit A-1 for contractual information and requirements).

**2. Background Information**

The County of San Diego is the federally designated Community Action Agency for the area and receives an annual allocation of Community Services Block Grant (CSBG) revenue to fund services that help persons to transition from poverty and dependency to self-sufficiency by strengthening family functioning. Strategies for the programmatic use of CSBG funding are included in the 2012-2013 Community Action Plan approved by the County Board of Supervisors (Minute Order 13) on May 24, 2011. The Plan was developed by the County's Health and Human Services Agency Community Action Partnership with community input through public hearings which included a needs assessment and on-line surveys

The program focuses on improving the ability for low-income families to develop social competence and change their conditions of poverty while becoming job ready. Individuals and families are assisted in transitioning from poverty and dependency to self-sufficiency through case management, direct social services, or referrals for needed services such as employment placement for employable clients, and strengthening of family functioning.

The Family Self-Sufficiency programs supports *Live Well, San Diego*, the County's 10-year plan to achieve the vision for healthy, safe, and thriving communities by working closely with our communities to implement programs and initiatives that are designed to reduce the effects of poverty and help low-income families move towards self-sufficiency.

*Live Well San Diego* was developed by the County of San Diego as a comprehensive, innovative strategy on wellness. This long-term plan combines the efforts of partners inside and outside County government to help all residents be healthy, safe, and thriving. All HHSA contractors, to the extent feasible, are expected to advance this initiative, which is being implemented in a phased approach. The first phase, Building Better Health, was adopted by the Board of Supervisors in 2010, and focuses on improving the health of residents and supporting healthy choices. The second phase, Living Safely, seeks to ensure residents are protected from crime and abuse, neighborhoods are safe, and communities are resilient to disasters and emergencies. The third phase, Thriving, focuses on promoting a region in which residents can enjoy the highest quality of life.

Information about the initiative can be found on the County's website and a website designated to the initiative:

- [http://www.sdcounty.ca.gov/hhsa/programs/sd/live\\_well\\_san\\_diego/index.html](http://www.sdcounty.ca.gov/hhsa/programs/sd/live_well_san_diego/index.html) and

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- <http://www.LiveWellSD.org>

In alignment with *Live Well San Diego* Initiative, the FSS program includes the provision of services related to the Supplemental Nutrition Assistance Program Education (SNAP-Ed). Information and contractual obligations of the SNAP-Ed Program can be found in Exhibit A-1 – Statement of Work for SNAP-Ed Services. Standards to achieve *Live Well San Diego* are listed in but not limited to Section 3.

Starting in Calendar Year 2013, contracts awarded will use a three-tiered system to serve clients and move them towards self-sufficiency. Based on feedback from community stakeholders, current and past FSS Contractors and the community assessment results from the 2012-2013 Community Action Plan, the County has identified that FSS families tend to fall into three different categories which will be defined as “Tiers” for the purposes of providing Self-Sufficiency services.

### **3. Goals and Outcomes**

- 3.1. Goals:** Contractor’s program shall be designed to achieve the goal of the Family Self-Sufficiency Services (FSS) program. The FSS program goals include, but are not limited to: improving the clients’ conditions of poverty through gainful employment for those who are employable, securing permanent income for those who are unemployable, and developing the social and financial competence of the clients they serve to achieve self-sufficiency and enjoy a safe, healthy and thriving lifestyle.

As mentioned in Section 2, Contractor shall use the three-tiered system described below to serve clients and move them towards self-sufficiency. The three-tiered system is derived from definitions from the Results Oriented Management and Accountability (ROMA), a performance-based initiative used by Community Action Agencies across the nation. The Tiers are as follows:

- **In-Crisis (Tier I):** clients in Tier I have needs that need to be met immediately in order to protect their physical and/or emotional safety. Basic needs are unable to be met, and assistance in accessing support and benefits is needed. In this Tier participants will generally receive the following services: emergency food/shelter, job readiness, child care assistance, transportation assistance, and/or Access to Benefits screening or application assistance. Services in this Tier shall not exceed ninety (90) days.
- **At-Risk (Tier II):** clients in Tier II do not have needs that affect their immediate safety, however still need assistance in finding more permanent, long-term, self-sufficient solutions. In this Tier clients will generally receive the following services: transitional shelter, rental assistance, employment placement, employment supports (including retention and/or upgrades), financial education, Access to Benefits (including health care) including application assistance, and can participate in SNAP-Ed as appropriate. Services in this Tier shall not exceed sixty (60) days.
- **Stable and Living Well (Tier III):** clients in Tier III are secure and demonstrate a commitment to work towards self-sufficiency, relying less on government assistance and willing to plan for the future. Clients in this Tier will generally receive the following services: job development and navigation (reference Paragraph 7.7.3), employment coaching, training supports (subsidized employment, training), long-term/permanent housing when available, and connection to the One-Stop Career Centers for employment needs. SNAP-Ed activities can also be offered to participants in this Tier.

This tiered system will allow Contractor to address client needs on a case-by-case basis and more effectively and efficiently address their needs and provide appropriate services

- 3.2. Outcome Objectives:** Contractor shall achieve the following outcome objectives:

#### **3.2.1. Employment:**

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**3.2.1.1. Employment Placement:** place a minimum of one hundred-twenty-five (125) unduplicated participants in employment during all other option years (CY 2014 through CY2017) in the **East Region**.

A placement shall be defined as obtaining a job for a case managed client after the date of entry into the FSS program, as a result of the Contractor's efforts. The client shall remain employed in a job for 45 days or more, following their start of employment for the placement to be claimed by the Contractor.

If a participant is employed by temporary job placement agency, the total number of days **worked** must equal 45 in order for the placement to be claimed. The time between job placements shall not exceed 30 days, should there be a gap of more than 30 days the number of days worked must start over with the new placement date.

**3.2.1.2. Employment Retention:** achieve a minimum of one hundred nineteen (119) unduplicated Employment Retentions for participants during all other option years (CY 2014 through CY2017) in the **East Region**.

Employment Retention shall be achieved when a case managed client remains employed with the same employer on the 60<sup>th</sup> day following the first day of the client's Employment Placement.

If a participant is employed by temporary job placement agency, the total number of days **worked** must equal 60 in order for the retention to be claimed. The time between job placements shall not exceed 30 days, should there be a gap of more than 30 days the number of days worked must start over with the new placement date.

**3.2.1.3. Employment Upgrade:** a minimum thirty (30) unduplicated case managed participants during all other option years (CY 2014 through CY2017) in the **East Region**.

An employment upgrade is defined as:

- a) Increase in employment hours by a minimum of 5 hours per week on a permanent basis; or
- b) Increase of wages resulting from employment promotion; or
- c) Increase of wages and/or hours resulting from new employment; or
- d) Increase in benefits of the employed client (for example, participant is provided with health insurance while previously he/she had no health insurance). This may include Medi-Cal, or other low-income health programs available.

**3.2.1.4. Employment Supports:** provide the following employment supports to a minimum of one hundred twenty-five (125) participants during all other option years (CY2014 through CY2017) in the **East Region**.

Employment Supports enhance opportunities for employment, lead to job placement, job retention or an increase in employment income.

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Employment Supports are defined as:

- a) Enrolling clients in GED, English as a Second Language (ESL) or vocational training, or assisting them in completing GED or vocational training; or
- b) Securing child care to apply, accept or retain employment; or
- c) Provide assistance in obtaining a California Drivers License by covering the cost of a new or renewed license, up to a maximum cost of the current California Department of Motor Vehicle fee for a new or renewed license; or
- d) Securing transportation to search for, accept, or retain employment; or
- e) Housing retention assistance to enter, retain or participate in work related activities up to a maximum \$1200.

**Note:** Contractor shall provide employment supports to clients for no more than five (5) instances per client in a calendar year.

**3.2.2. CSBG/EITC Tax Preparation:** complete a minimum of **one hundred twenty-eight (128)** unduplicated federal tax preparations during the initial contract period (April 1, 2013 – December 31, 2013), and a minimum of **five hundred (500)** unduplicated federal tax preparations during all other option years (CY2014 through CY2017) for CSBG eligible participants in the **East Region**.

Contractor shall focus on serving new clients with free tax preparation services; and offer assistance to returning EITC clients that are willing to learn how to prepare their own returns with free/low-cost online self-service tax websites (such as [www.myfreetaxes.com](http://www.myfreetaxes.com)).

**Note:** Refer to Section 7.10 and 8.4 below for additional information and reporting requirements for CSBG/EITC Tax Preparation

**3.2.3. Economic Asset Enhancement:** During the initial contract period (April 1, 2013 – December 31, 2013) ensure a minimum of **thirty-eight (38)** participants, and a minimum of **fifty (50) participants** during all other option years (CY2014 through CY2017) achieve economic asset enhancement resulting from efforts as defined below.

Economic asset enhancement is defined as achieving items (a) and (b) below as mandatory requirements; items (c) and (d) are not mandatory, but conducted based on the need of the participant.

- a) Completion of all items described in Section 7.6 (Financial Education) below; and
- b) Development and implementation of a household budget; and
- c) Opening and maintaining a bank account for at least one (1) month; or
- d) Demonstrating improved maintenance of a bank account for at least three (3) months as indicated by:
  - A decrease in overdraft charges;
  - A decrease in charges for using ATMs;
  - Establishment of direct deposit of income along with one automatic bill payment; or
  - Instructing participant to open a bank account, and conducting follow up after thirty (30) days to determine how the account is being used; or
  - Identifying and resolving barriers to opening or maintaining bank accounts.

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**3.2.4. Emergency Services**

**3.2.4.1. Emergency Food Distribution:** distribute a minimum of **three hundred nineteen (319)** food packets to participants who are in need of food during the initial contract period (April 1, 2013 – December 31, 2013), and a minimum of **four hundred twenty-five (425)** food packets during all other option years (CY2014 through CY2017). The maximum number of food packets per family that may be claimed is four (4) per contract year. Food distribution shall only be provided to customers that fall within Tier I and Tier II of service delivery.

**3.2.4.2. Referrals for Emergency Shelter:** During the initial contract period (April 1, 2013 – December 31, 2013) provide a minimum of **fifty-five (55)** unduplicated referrals, and a minimum of **ninety-five (95)** unduplicated referrals during all other option years (CY2014 through CY2017), for Tier I and Tier II homeless individuals and families, or those at-risk of becoming homeless, to shelters that result in one or more bed nights.

**Note:** Referrals for Emergency Food and Shelter during Tier III can be used in cases with special circumstances. Contractor shall document and track these instances within the client case notes and in the FSS Client Tier Tracking Sheet (Attachment 2).

**3.2.5. Access to Benefits:** provide CalFresh application assistance to a minimum of **one hundred thirteen (113)** FSS clients and/or families\* during the initial contract period (April 1, 2013 – December 31, 2013), and a minimum of **one hundred fifty (150)** FSS clients and/or families during all other option years (CY2014 through CY2017).

As part of the initial assessment, Contractor shall provide access to benefits by conducting benefit screening, using the Self-Sufficiency Solutions Calculator (<http://www.ssscalc.org>) or using Benefits CalWIN to process online applications for participants not already receiving benefits, such as CalFresh and Medi-Cal.

Unless the client refuses services or chooses to visit one of the HHSA FRCs, the Contractor shall provide assistance to clients with the CalFresh application assistance by using the electronic application tools available on-line. The contractor will register a designated computer(s) with the county of San Diego to ensure tracking of applications submitted. Refer to Section 8.5 for reporting requirements.

**\*Note:** to claim this pay point, Contractor shall have assisted the client and/or household with a CalFresh application, which is defined as one single CalFresh application per client and/or household. If the client is not eligible for CalFresh, Contractor shall assist the client and/or household with Medi-Cal enrollment (only one application can be claimed per client/household).

**4. Target Population and Geographic Area**

**4.1. Target Population:** Contractor shall provide the services described herein to the following target population:

Contractor shall provide the services described herein to individuals and families whose income is at or below 100% of the federal poverty level and/or are recipients of any of the following: CalWORKs, CalFresh, or Federal SSI. The current CSBG poverty guidelines can be found on the California Department of Community Services and Development website <http://www.csd.ca.gov>. CSBG funding requires that eligible client households must meet 100% of the United States Department of Health and Human Services' low-income poverty guidelines. The current CSBG poverty guidelines can be found on the California Department of Community Services and Development website (<http://www.csd.ca.gov>).



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**4.2. Geographical/Regional Service Area(s)**

Contractor shall provide services in the Health and Human Services Agency **East Region**, pursuant to Attachment 1 (HHS Regions by Zip Code). All contracted facilities shall be accessible to public transportation; services shall be provided at the facilities and hours of operation listed. This may include services at facilities other than their normal place of business, upon approval and as requested by the County.

**5. Definitions**

- 5.1. Assessment Tool:** Standardized family appraisal tool provided by the County, for use by the Contractors' Case Managers that will include services needed, family strengths, family composition, and barriers to self-sufficiency.
- 5.2. Financial Education:** Instruction/counseling to assist clients in acquiring basic skills to manage routine financial matters and maximize their use of income. Contractor shall develop a financial education curriculum that meets the needs of the community for which the proposal is submitted. The following elements constitute the core curriculum required for this instruction:
- 5.2.1. Budgeting and Value:** Developing a basic household budget and understanding cost savings strategies.
  - 5.2.2. Taxes and Tax Credits:** Understanding payroll deductions, how to read pay stubs, completing W-2s, and applying for tax credits (EITC and Child Tax Credit).
  - 5.2.3. Banking Services:** Understanding the basics of banking (e.g., the difference between savings and checking accounts) and asset enhancement such as Individual Development Accounts.
  - 5.2.4. Credit and Setting Financial Goals:** Understanding the importance of maintaining good credit, credit scoring and assistance with improving credit scores.
- 5.3. Access to Benefits:** Facilitating the process which allows clients to access and/or be referred to additional services and resources. Generally services are provided by a dedicated staff member who has the primary duty of screening clients for public benefits, such as, but not limited to CalFresh. Other duties include assisting clients/families with the completion of an online application for benefits, and assisting them through all phases of the application process.
- 5.4. Leveraging:** The term applied to adding non-cash value to the contract. It is the amount of resources not purchased or acquired through the contract award that the Contractor adds to the contract in support of services.
- 5.5. Mystery Shopper:** A County staff person, claiming to be a prospective client who contacts the Contractor to verify that the information imparted to the public by the Contractor regarding Family Self-Sufficiency services is accurate.
- 5.6. Nutrition:** In the context of FSS, this refers to the United States Department of Agriculture's (USDA) 2010 Dietary Guidelines. These Guidelines are the U.S government's recommendations based on a preponderance of the scientific evidence for nutritional factors that are important for promoting health and lowering risk of diet-related chronic disease. These guidelines are available on the USDA's Dietary Guidelines website, [www.DietaryGuidelines.gov](http://www.DietaryGuidelines.gov). Nutrition instruction also includes teaching participants about making smart food choices, and balancing food and physical activity to increase chances for a healthy life based on the 2010 Dietary Guidelines for Americans.

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5.7. Unbanked Participant: A term applied to a participant whose relationship with a financial institution is any of the following:

5.7.1. Non-existent: Participant has no open bank account(s) and no established banking relationship.

5.7.2. Existent, not utilized: Participant has an open bank account but account statement reflects no activity in recent months.

5.7.3. Existent, negative utilization: Participant has an open bank account but, the account statement reflects one or more of the following:

- a) Overdraft fees;
- b) Fees in excess of Ten dollars (\$10) per month for non-participating ATM usage;
- c) Fees for not meeting average minimum balance requirements, as determined by the financial institution;
- d) Monthly fees on checking account where Contractor is successful in assisting participant to obtain a new checking account with lower or no monthly fees.

**6. General Requirements for Service Delivery**

6.1. County Initiatives: Contractor shall provide services in a manner that supports San Diego County's *Live Well, San Diego* Initiative to make people's lives healthier, safer and self-sufficient by delivering essential services in San Diego County. For more information on the *Live Well San Diego* Initiative, visit the County of San Diego's Health and Human Services Agency website (<http://www.sdcounty.ca.gov/hhsa/index.html>).

6.2. Transporting Minors: Contractor shall not use taxicabs to transport unescorted minors (individuals under the age of 18) who receive services funded by the County of San Diego.

6.3. Literacy Tutoring: Contractor shall assist all families limited by the inability to read and write to gain access to literacy tutoring through referrals.

6.4. Surveys: Contractor shall conduct on-going needs assessments survey to gather input regarding community service needs from economically disadvantaged families. Survey shall request for information on the major funded FSS services, at a minimum the survey shall include: employment, employment retention, employment supports, financial literacy, and emergency services.

6.5. Program Management: Contractor shall provide County with a revised organizational program chart identifying key personnel and reporting relationships within 72 hours of any changes to organizational structure.

6.6. Complaint Process: Contractor shall have written policies and procedures for a complaint process. The policy shall identify staff responsible, an appeal process, tracking system, follow-up procedures, and a timeline. Contractor shall use relevant Federal, State and County regulations for investigating and resolving complaints. A copy of the complaint policy shall be conspicuously displayed. Complaints and investigation results shall be forwarded to the County within 24 hours of both the receipt and resolution of the complaint.

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**6.7. Memoranda of Agreement (MOAs) and Memoranda of Understanding (MOUs) with Service Providers:**

**6.7.1.** Contractor shall maintain on file, original MOAs and/or MOUs for each service provider.

**6.7.2.** Contractor shall provide signed copies of all MOAs and/or MOUs to County within 30 days of contract start date.

**6.7.3. Contractor shall request prior approval for subcontracts over \$50,000 and provide copies of the contract documents within 30 days.**

**6.8. Bilingual Access:** Contractor shall identify program staff that can provide bilingual/bicultural services to individuals who need or prefer to communicate in Spanish. If there is no staff that can perform this function, Contractor shall identify program staff that can facilitate provision of bilingual/bicultural services to individuals by establishing alternate methods to ensure that language appropriate services are available.

**6.9. Accessibility:** Contractor shall provide services which reach 100% of the zip codes within the **East Region** (see Attachment 1 for the HHSA Regions by Zip Code).

**6.10. Cultural Competency:** Contractor shall maintain a plan for developing and maintaining cultural competency in their program design to ensure staff are culturally competent to serve clients with diverse backgrounds. The plan shall address specific language/cultural needs and shall ensure program staff are culturally competent to serve diverse backgrounds of clients including:

**6.10.1.** Plans for recruiting and hiring staff reflective of the major cultural groups in the region.

**6.10.2.** Plans for providing services to monolingual or Limited English Proficient individuals within the target population, and arrangements that will be made for language translation services when staff do not possess the capability to speak the clients' language.

**6.10.3.** Training in cross-cultural sensitivity that will be provided to staff and how this will be reinforced in the program.

**6.11. Disaster Workers:** Contractor's staff shall be available upon request of the Public Health Officer to assist in any necessary tasks during a public health disaster or County emergency state of alert.

**7. Specific Requirements for Service Delivery**

**7.1. Eligibility Determination:** Contractor shall verify the service eligibility of all prospective low-income families in accordance with CSGB as determined below:

- **CSBG:** clients served under the CSBG program shall be at or below 100% of the Federal Poverty Level (FPL), and/or are recipients of any of the following: CalWORKs, CalFresh or Federal SSI. Proof of eligibility must be obtained for all clients served under these programs. Acceptable documentation includes, as appropriate, copies of the following: recent pay stubs or other documents that indicate annualized family income falls at or below the Federal Poverty Level, Notice of Action or other document dated within thirty (30) days of enrollment certifying service low-income families' receipt of CalWORKs or Federal SSI.

**Note:** Self-certification of client is only allowable when above documentation is not available.

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**Agreement with Home Start, Inc. for Family Self-Sufficiency Services (FSS),**  
**East Region**

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**Exhibit A – Statement of Work**

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- 7.2. Family Self-Sufficiency Services: Contractor shall provide Family Self-Sufficiency services in accordance with the 2014-2015 Community Action Plan. Input from public hearings in each of the six HHSA regions was used to develop the plan.
- 7.3. Case Management: Contractor shall describe how they will provide case management services to eligible individuals and families. At a minimum, services shall include securing basic needs that are fundamental to the participant's well being, identifying barriers to self-sufficiency and developing a case plan that addresses the barriers to self-sufficiency. Case record documentation/narratives shall clearly demonstrate how the program services enhanced the capacity of individuals and families to achieve economic self-sufficiency.
- 7.4. Assessment Tool: Contractor shall utilize a standardized assessment tool. Contractor shall ensure that their case managers utilize the standardized assessment tool developed in conjunction with the County (See Paragraph 5 – Definitions).
- 7.5. Participant File Reviews by Contractor: Contractor shall complete a progress review with one hundred percent (100%) of all active FSS participants in Tier I and Tier II every sixty (60) days, Tier III participant files shall be reviewed every ninety (90) days.
- 7.6. Financial Education: Contractor shall make available Financial Education instruction to all clients year round who request Family Self-Sufficiency and tax preparation services.
- 7.6.1. Instruction shall be based on the County's core curriculum (See Paragraph 5 – Definitions). Contractor may expand the curriculum to cover additional subjects as appropriate that address the unique needs of each community to be served.
- 7.6.2. Instruction shall include pre and post-evaluations to assess each client's success as measured by, but not limited to, the following Financial Education performance indicators:
- a) Increased knowledge about personal finances
  - b) Increased knowledge about FICO scores
  - c) Increased knowledge about opening of bank accounts with no fees or low-cost fees.
- 7.7. Employment Development: Contractor shall place emphasis on the employment development of clients within the FSS program activities. Services should include, but are not limited to:
- 7.7.1. Liaison Activities: Contractor shall provide liaison activities for referrals to FSS services and participate in joint partner meetings to ensure on-going, effective communication. Contractor shall ensure that FSS services are available to Family Resource Center (FRC) and Welfare-To-Work (WTW) clients as appropriate.
- Liaison activities shall include training for HHSA line staff in FSS program eligibility, and services with the objective of informing County staff about how their clients can benefit from the program.
- 7.7.2. Service Integration: Contractors shall develop and maintain a cost effective service integration strategy with the Workforce Investment Act (WIA) funded One-Stop Career Centers and other Workforce Development entities in the region and negotiate a Memorandum of Agreement (MOA) to include items such as referrals to and from FSS services, and participation in joint meetings and liaison activities.
- Service integration shall include round table discussion among educators, businesses, trainers and service providers to increase the marketable skills of persons throughout the target population who are employable.

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**7.7.3. Job Development/Navigation:** linking FSS clients to systems and industries to help them succeed at all the steps of their career path, and become confident in their skills as they seek employment opportunities (through a dedicated staff person). Job development/navigation connects the client to education/training providers and components, career and industry information, job opportunities, and utilizes the FSS Program deliverables to ensure clients have the supports and resources needed to be successful.

**7.8. Referral Follow-up:** When case managed clients are referred to other agencies/resources for planned services, Contractor shall conduct follow-up with the individual or family and the referral agency within two weeks with the goal of determining whether or not the individual or family received services from the referral agency and if not why not.

Follow-up shall be conducted within the guidelines of HIPAA as appropriate. Results of referrals and follow-up information shall be documented in the case file and addressed in the assessment.

**7.9. Shelter Services that result in a bed night:** Contractor shall provide shelter services using a community collaborative approach as the core infrastructure to their service delivery model. Shelter services can be achieved in two different ways:

**7.9.1. Hotel Voucher Program**

7.9.1.1. Contractor shall accept referrals for shelter services from 2-1-1 San Diego and/or work with other partner agencies when administering the Hotel Motel Voucher program. Referrals coming from 2-1-1 or partner agencies for the Hotel Voucher program shall be administered as defined in the agreed upon Hotel Voucher Program Design and Hotel Voucher Criteria documents and may include, but is not limited to the following activities.

- a. Ensuring that priority is given to homeless families with minor children, seniors, pregnant women at risk of complications with childbirth, and individuals with disabilities. Non-priority individuals and families can be served when priority individuals and families have received services.
- b. If not eligible for the Hotel Voucher program, make reasonable efforts to arrange other shelter options for families and individuals in need of shelter during the coldest part of the year (generally the months of November through December and January through April).
- c. Assist participating families to find permanent housing when possible. Housing for disabled persons shall comply with ADA and Title 24 of the California Administrative Code.
- d. Establish agreements with emergency and transitional housing agencies, to leverage services that further enhance homeless services to clients.
- e. Issue payment for hotel vouchers distributed within contractor's region to Hotels with signed Hotel agreements and forward to the County Hotel invoices and original paid vouchers on a monthly basis.
- f. Refer CalWORKs clients who are in need of shelter to the CalWORKs Homeless Assistance program, as the primary option prior to referring the client to the Hotel voucher program.

**7.9.1.2. Shelter Referrals**

7.9.1.2.1. In order to submit a request for payment for the "Shelter Referral" pay point, contractor shall ensure that homeless clients enrolled in the FSS program receive a referral for shelter that leads to a bed night when the family or individuals are not eligible for the County's Hotel Voucher program.

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Contractor shall ensure that following activities are completed as part of implementing the referral process:

- a. Develop and maintain working relationships with local emergency and transitional shelter programs serving families and singles.
- b. Make referrals to homeless clients that may not be otherwise eligible to a Hotel Voucher and ensure a bed night(s) is secured.
- c. For CalWORKs families with pending or active cases, refer to the CalWORKs (CW) Homeless Assistance program for temporary and/or permanent housing.

**Note:** The CW Homeless Assistance may also be available for families at risk of being homeless.

- d. Maintain on-going, open communication with CalWORKs staff after referrals are made to ensure coordination of client services.

**7.9.2.** Ensure that case files are maintained for all persons receiving shelter services.

**7.10. Earned Income Tax Credit:** Contractor shall implement an Earned Income Tax Credit (EITC) Program that provides free tax preparation services for low-income county residents.

Contractor shall coordinate EITC services with the San Diego County, the EITC Thrive Coordinator and the San Diego County EITC Coalition to ensure EITC services are provided in the **East Region**. For more information refer to the Thrive website ([www.thrivesandiego.org](http://www.thrivesandiego.org)).

Contractor shall maintain an EITC Plan that shall include, but is not limited to the following:

- 7.10.1.** Location of Tax Preparation Sites;
- 7.10.2.** Number of days open;
- 7.10.3.** Number of hours open;
- 7.10.4.** Specific times each site will be open for clients;
- 7.10.5.** Number of volunteers to be recruited and trained;
- 7.10.6.** How volunteers will be recruited, trained and retained;
- 7.10.7.** Client flow process;
- 7.10.8.** How Contractor will verify when client is at or below the Federal Poverty Level;
- 7.10.9.** How client privacy and confidentiality issues will be maintained (i.e. interviews, records, consultation, and process);
- 7.10.10.** Method for providing tax preparation assistance to clients;
- 7.10.11.** Process for providing financial education information;
- 7.10.12.** Process for providing low-cost or no-cost health insurance information and application assistance;
- 7.10.13.** Process for providing CalFresh/Food Stamps information and application assistance;
- 7.10.14.** Utilizing the Tax Payer Survey;
- 7.10.15.** Participation on the County-wide Earned Income Tax Preparation Coalition lead by HHSA CAP and United Way;
- 7.10.16.** Data collection and reporting methods;
- 7.10.17.** Follow-up activity related to financial education and how participants utilized their tax refund;

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- 7.10.18. Tax Preparation quality assurance methods;
- 7.10.19. Promotional and outreach methods to the community; and
- 7.10.20. Plan to achieve a 10% increase in federal tax preparations for each subsequent year.
- 7.11. SNAP-Ed: Contractor shall provide SNAP-Ed Program services as indicated within Exhibit A-1 – Statement of Work for SNAP-Ed Services.
- 7.12. Food and Nutrition
- 7.12.1. Contractor shall assist FSS clients with emergency food and nutrition needs as described in Section 5.6 (Nutrition).
- 7.12.2. Contractor shall provide CalFresh program information supplied by the County to all FSS clients, make referrals to County Family Resource Centers and assist with applications for those clients who meet criteria provided by the County and are not in receipt of benefits.
- 7.12.3. Contractor shall provide FSS clients with emergency food provisions as needed to help them meet immediate needs. The food package shall include food sufficient to cover the needs of the family until they are able to establish a stable food resource such as CalFresh. The emergency food package shall contain nutritionally balanced groceries.
- 7.13. Health Insurance: Contractor shall refer individuals and families without health insurance to HHSA Family Resource Centers or other agencies for enrollment in Medi-Cal or other no-cost or low-cost health insurance. In addition, Contractor shall utilize a referral process to ensure that individuals and families who do not qualify for no-cost or low-cost insurance and/or cannot afford low-cost insurance are referred directly to no-cost health clinics for health and medical needs.
- 7.14. Regional Collaboratives: Contractor shall engage in and assume a leadership role in collaborative activities within the Health and Human Services Agency (HHSA) programs providing services to low-income families in the proposed region that include but are not limited to: CalWORKs, CalFresh, Medi-Cal, Behavioral Health Services, Domestic Violence, Child Welfare Services, and Community Services for Families.
- In addition, Contractor shall engage regional community partners to address program outreach, participant recruitment, and resource sharing to achieve the objectives of the FSS program.
- 7.14.1. Responsibilities for collaborative activities include as appropriate:
- a) Convening regularly scheduled meetings for all the partners every two months beginning in May 2013.
  - b) Conducting follow-up activities.
  - c) Maintaining community partner participation.
  - d) Providing assistance to the County with preparation of the community assessment tool that will collect community input for CAP's two-year state plan.
- 7.14.2. Contractor shall formalize and maintain collaboration through Memoranda of Agreement between existing or new collaborative partners detailing participation and contributions of each partner related to meeting the needs of the target population specific to Employment, Housing, Earned Income Tax Credit (EITC), Child Injury Prevention Assessment and Distribution of Safety Equipment, Energy Assistance (enrollment in San Diego Gas and Electric's Project CARE), CalFresh Outreach and Application, Childhood Immunization, Literacy, Crisis support, and Financial Education for the purpose of ensuring a continuum of services through direct funding or

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leveraged resources between the collaborative members. Collaborative members shall include the County's contracted Community Services for Families and the Hunger Coalition.

- 7.15. Contractor Trainings: Contractor shall develop and conduct quarterly trainings that are related to the target population, community resources, and resources available through the County of San Diego Health and Human Services Agency. Contractor trainings shall include at a minimum: Contractor staff, key community stakeholders, other County program providers such as Alcohol and Drug Services and Mental Health providers and the County contracted Community Services for Families provider specific to their region.
- 7.16. Healthy Families: Contractor shall collaborate with the First 5 Commission to assist families in obtaining health and developmental screenings. Contractor shall also assist families with school age children with attendance related issues.
- 7.17. Senior Volunteers: Contractor shall utilize senior volunteers to the extent possible in their service delivery by collaborating with the county's Aging and Independence Services (AIS) in the region.

**8. Data Collection and Reporting Requirements**

- 8.1. Monthly Report: Contractor shall submit a monthly report to the County, on the 10th of the month following the reporting month, with the following information:
- 8.1.1. Number of unduplicated participants who were placed in employment;
  - 8.1.2. Number of unduplicated employment retentions achieved;
  - 8.1.3. Number of unduplicated participants who achieved employment upgrade;
  - 8.1.4. Number of employment supports achieved;
    - 8.1.4.1. Housing/rental assistance supports provided, contractor shall report:
      - a) Dollar amount of housing payments expended by each agency in each HHSA County region
      - b) Number of single-parent families (male/female)
      - c) Number of Families that achieved permanent housing
  - 8.1.5. Number of unduplicated CSBG tax preparations completed;
  - 8.1.6. Number of unduplicated participants who completed economic asset enhancement;
  - 8.1.7. Number of food packets distributed;
  - 8.1.8. Number of unduplicated referrals that resulted in a bed night;
  - 8.1.9. Number of unduplicated participants who completed SNAP-Ed training;
  - 8.1.10. Number of participants in each Tier; the percentage that moved from Tier I to Tier II, and Tier II to Tier III.
  - 8.1.11. All items detailed in Paragraph 8.2 below.
- 8.2. Shelter Services Data Entry and Reporting: Contractor shall agree to use the Regional Task Force on the Homeless (RTFH) – Service Point Intake – Data Collection system to track and record the Hotel Voucher recipient information.

Contractor shall perform data entry to record, track and provide reports to the County utilizing Service Point Intake data collection system. Contractor shall complete the Service Point Intake Data sheet (provided by the County) and enter the data into the Service Point Intake computer application. The data shall include (Reference 7.9):

- 8.2.1. Number of shelter vouchers issued



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- 8.2.2. Number of unduplicated vouchers issued
  - 8.2.3. Number of bed nights of each voucher and length of stay
  - 8.2.4. Number of single adults served
  - 8.2.5. Number of married adults without children
  - 8.2.6. Number of families and family size
  - 8.2.7. Number of two-parent families
- 8.3. **FSS Client Tier Tracking Sheet:** Contractor shall complete and provide at the request of the County, a FSS Client Tier Tracking sheet, with the following information:
- 8.3.1. Client case number/identifier
  - 8.3.2. Date of enrollment into FSS
  - 8.3.3. Tier in which the client began FSS services
  - 8.3.4. Dates client moved to next tier (if applicable)
  - 8.3.5. Date the case was closed (if applicable)
  - 8.3.6. Notes or information on the client and/or services (as applicable)
- 8.4. **EITC/Tax Preparation Reports:** Contractor shall provide reports, at the request of the County, detailing the results of the EITC/Tax Preparation Program. The reports shall include the following information:
- 8.4.1. Number of CSBG Tax Preparations completed (Federal and State);
  - 8.4.2. Number of CSBG clients who received EITC;
  - 8.4.3. Dollar amount of CSBG Federal Tax returns;
  - 8.4.4. Dollar amount of CSBG State Tax returns;
  - 8.4.5. Number of tax service sites per region;
  - 8.4.6. Number of volunteers and volunteer hours per site;
  - 8.4.7. Amount of In-Kind match and description of in-kind;
  - 8.4.8. Number of CalWORKs families served.
- 8.5. **Access to Benefits Report:** Contractor shall provide benefit screening data reports as requested by the County. Contractors shall be required to register the computers used to process online CalFresh benefits applications
- 8.6. **Semi-Annual Report:** Contractor shall submit the reports required by the California Department of Community Services and Development (CSD) to the County. The required reports are the CSD 295 (Demographic Data) and CSD 801 (National Performance Indicators) by July 10 of each year, in the format provided by the County for the period January through June. The report shall include the following:
- 8.6.1. Number of families case managed;
  - 8.6.2. Number of case managed families carried-over from the previous year;
  - 8.6.3. Number of case managed employed participants who began services as unemployed;
  - 8.6.4. Number of unduplicated participants who received an increase in employment income;
  - 8.6.5. Number of cases closed;
  - 8.6.6. Number of cases closed as a result of achieving self-sufficiency;

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- 8.6.7. Number of unduplicated participants who were enrolled in Vocational Training, GED or H.S. Diploma;
- 8.6.8. Number of unduplicated participants who attain GED/vocational training;
- 8.6.9. Completion of State Community Service Development Demographic Report (form CSD #295);
- 8.6.10. Number of families assisted with applying or maintaining health insurance; and
- 8.6.11. Number of families obtaining health insurance.
- 8.6.12. Number of individuals and families screened for public benefits eligibility, the number of individuals and families assisted in completing the application process, and the programs to which the applications were submitted.
- 8.7. **Annual Report**: Contractor shall work in conjunction with the Thrive Coordinator to develop and submit an annual report with all the items detailed in Section 8.4 and the total number of CSBG tax preparations completed during the EITC Tax Campaign during the contract year.
- 8.8. **Client Satisfaction Survey**: Contractor shall conduct semi-annual client satisfaction surveys and have results readily available at the County's request.
- 8.9. **Additional Reports**: Contractor may be asked to provide additional data to the County in response to a county, federal or state inquiry or request. If this situation should arise, the Contractor shall provide the County with the requested data.
9. **Continuous Service and Limitation of Costs**
- 9.1. Contractor shall agree to ensure that all services required under this contract shall be accomplished throughout the entire twelve (12) month period of the initial term and each option years.
- 9.2. Contractor shall notify the Contracting Officer Representative (COR) in writing whenever it has reason to believe that:
- 9.2.1. The amount Contractor expects to invoice under this contract in the next sixty (60) days, when added to all invoices previously paid, will result in a claim percentage variance greater than 20% vs. the term. The percentage variance is computed as follows:
- a) Divide the number of months elapsed by the contract period and multiply the result by 100.
  - b) Next divide the anticipated claim amount by the contract amount. Multiply the result by 100.
  - c) Subtract the result obtained in 10.2.1.a. from the result obtained in 10.2.1.b. This is the claim percentage variance.
  - d) Example: Contract amount - \$120, 000. Months elapsed – 3. Divide 3 by 12 and multiply by 100. Result: 25%. Contractor anticipates that by the third month the claims will be approximately \$50,000. The project percentage claim amount is: 50000/120000 or 41.7%. The percentage variance is therefore 41.7 -25 or 16.7%. This is below the 20% threshold and so the Contractor is not required to notify the County.
- 9.2.2. The total price for the performance of this contract will be either greater or substantially less than had been previously stated.
- 9.2.3. As part of the notification, Contractor shall provide the COR, in writing, with the following:
- a) Reasons and justifications for the anticipated invoicing over or under the contract price, and;
  - b) A plan for keeping the price within the contract amount and the positive and negative impacts of doing so, and a revised estimate of the total price of performing this contract, in accordance with Exhibit A, Statement of Work, if funding can be increased.

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- 9.3. County is not obligated to pay Contractor in excess of the contract price specified in Exhibit C, Payment Schedule, unless a properly executed contract amendment has been issued.
- 9.4. Contractor is not obligated to continue performance under this contract (including actions under the Termination clause of this contract) in excess of the contract price specified in the Schedule, until the COR:
  - 9.4.1. Notifies the Contractor in writing that the total annual contract price has been increased, and
  - 9.4.2. Provides a revised total annual contract price for performing this contract.

**10. Leveraging**

Contractor shall incorporate and utilize a private/public network of resources and services, both internally and externally, for the purpose of leveraging needed services to families. Contractor shall develop and implement a plan to:

- 10.1. Add 10% of verifiable in-kind contributions to the total contract amount
- 10.2. The County has the option to increase the following outcomes by a maximum of 10% in option years two, three, four, and five without increases in county funding:
  - 10.2.1. Employment placement and retention.
  - 10.2.2. EITC tax preparations.

**11. Automation**

- 11.1. Organizations contracting with the County for operation of the FSS Program should consider that they will be required to submit reports and/or other data in automated format. If the County were to develop a case information system that will ultimately replace paper records and result in the automatic compilation and periodic reporting of case data, service providers may be required to accept the installation and use of such a system.
- 11.2. Contractor shall have access to computer systems capable of successful operation of the IRS TaxWise Software for the each tax filing year. Contractor shall have the capability of electronically filing client tax returns and entering client survey information using the IRS TaxWise data base system.
- 11.3. Contractor shall have access to Service Point data system and agree to pay the annual fee as determined by the Regional Taskforce on the Homeless.

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**Agreement With Home Start, Inc.**  
**Nutrition Education and Obesity Prevention Branch**  
**Supplemental Nutrition Assistance Program-Education Services – East**  
**Exhibit A-1 – Statement of Work**

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**1. Scope of Work/Purpose**

Contractor shall provide nutrition education and services to eligible and potentially eligible CalFresh populations as part of the administration of the Nutrition Education and Obesity Prevention Branch (NEOPB) Supplemental Nutrition Assistance Program-Education (SNAP-Ed) program.

Contractor shall provide services to make healthy behavior choices more readily accessible to San Diego County residents who are Supplemental Nutrition Assistance Program (SNAP) participants, and to those eligible at or below 185% of the Federal Poverty Level (FPL). The purpose of the program is to empower low income Californians to increase fruit and vegetable consumption, physical activity, and food security, with the goal of preventing obesity and other diet-related chronic diseases.

**2. Background Information**

The Family Self-Sufficiency (FSS) program requires the provision of services related to the NEOPB SNAP-Ed program. The goal of program is to promote dietary guidelines, increase fruit and vegetable consumption, and increase physical activity among the CalFresh eligible and potentially eligible population. Information regarding the program can be found at <http://snap.nal.usda.gov/>.

The NEOPB SNAP-Ed program supports *Live Well San Diego*, the County's 10-year plan to achieve the vision for healthy, safe, and thriving communities by working with the communities to educate and promote healthy eating and living to low-income families.

*Live Well San Diego* was developed by the County of San Diego as a comprehensive, innovative strategy on wellness. This long-term plan combines the efforts of partners inside and outside County government to help all residents be healthy, safe, and thriving. All HHSA contractors, to the extent feasible, are expected to advance this initiative, which is being implemented in a phased approach. The first phase, *Building Better Health*, was adopted by the Board of Supervisors in 2010, and focuses on improving the health of residents and supporting healthy choices. The second phase, *Living Safely*, seeks to ensure residents are protected from abuse and neglect, neighborhoods are safe, and communities are resilient. The third phase, *Thriving*, focuses on promoting a region in which residents can enjoy the highest quality of life.

Information about the initiative can be found on the County's website and a website designated to the initiative:

- [http://www.sdcounty.ca.gov/hhsa/programs/sd/live\\_well\\_san\\_diego/index.html](http://www.sdcounty.ca.gov/hhsa/programs/sd/live_well_san_diego/index.html) and
- <http://www.LiveWellSD.org>

**3. Goals and Outcomes**

3.1. **Goals:** Contractor's program shall be designed to achieve the goals of the NEOPB SNAP-Ed program. goals are as follows:

- 3.1.1. To increase access and availability of healthy food and beverage options for San Diego County residents who are at or below income levels of 185% of the FPL.
- 3.1.2. To empower residents to make healthy eating and physical activity choices through nutrition education and community engagement opportunities.

3.2. **Outcome Objectives:** Contractor shall achieve the following outcome objectives:

- 3.2.1. **Direct Nutrition Education:** Provide education to a minimum of **six hundred thirty (630)** participants via nutrition education classes in the East Region. Contractor shall achieve at least 25% of the annual participant reach goal by the end of each quarter. Direct education consists of three categories:

- 3.2.1.1. **Type 1:** Class training to unduplicated participants for 15 minutes.

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3.2.1.2. **Type 2:** Class training to unduplicated participants which is more than 15 minutes, but less than 150 minutes.

3.2.1.2.1. A minimum of 95% of the trainings shall be Type 1 and Type 2 trainings; no more than a maximum of 80% of that total shall be Type 1 trainings.

3.2.1.3. **Type 3:** Class training to unduplicated participants in a 5-class series. Contractor shall facilitate the 5-class series in a 5-week timeframe or as directed by the County. All planned 5-class series shall be pre-approved by the County before scheduled. The training package for the 5-class series shall consist of sign-in sheets, recipes, and data cards.

The requirement for pre- and post- surveys for the 5-class series shall be directed by the County.

3.2.1.3.1. A minimum of 18 participants shall participate in Type 3 trainings.

3.2.1.3.2. In Federal Fiscal Year 2014 and 2015, the 5-class series shall focus on 9<sup>th</sup> through 12<sup>th</sup> grade high school youth during the months of January 1 through June 30. Specifically, for the high school population, 100% of the Type 3 trainings shall be reached by June 30. The training package for the 5-class series shall consist of sign-in sheets, pre and post surveys, recipes, and data cards. Complete training packages shall be received by the County no later than two weeks after the completion of the 5-class series. See chart below:

Below, the type 3 5-class series chart shows the minimum number of high school youth required to meet the 100% requirement for the 5-class series participants by June 30.

<b>Five class series participant reach between January 1 – June 30</b>	<b>East</b>
Number of high school youth participants	18

3.2.2. Indirect Nutrition Education: Provide education to a minimum of two hundred seventy (270) participants at public events and through materials distribution in the East Region. Contractor shall achieve at least 25% of the annual participant reach goal by the end of each quarter.

3.2.2.1. Contractor shall participate in a minimum of one (1) County-approved community event per month, as directed by County staff.

3.2.3. Communities of Excellence (CX3): Contractor shall coordinate NEOPB SNAP-Ed services directly with the Community Based Organization (CBO) listed below to ensure that the CBO conducts the following CX3 community engagement and educational activities related to the program:

3.2.3.1. Contractor shall ensure the designated CX3 organization collaborates with the Regional HHSA to recruit and shall retain a minimum of 15 community residents to participate in the CX3 project (s).

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Community Based Organization  
Little House Avocado  
131 Avocado Avenue, El Cajon, CA 92020  
Carol Lewis, Coordinator  
[coordinator@elcajoncollaborative.org](mailto:coordinator@elcajoncollaborative.org), (619) 447-4380

**4. Target Population and Geographic Area**

Target Population: Contractor shall provide the services described herein to the low-income SNAP-Ed eligible participants (at or below 185% of the Federal Poverty Level) who are currently receiving or potentially eligible to receive CalFresh benefits. Class sites for the NEOPB SNAP-Ed program must be pre-approved by the County before sites are used to conduct classes.

Please note: The Community Services Block Grant (CSBG) eligibility requirements shall not apply to NEOPB SNAP-Ed participants.

**4.1. Geographical/Regional Service Area(s)**

- 4.1.1. Contractor shall provide services in the HHSA Region, pursuant to Attachment 1 (HHSA Regions by Zip Code), or as directed by the County. All contracted facilities shall be accessible to public transportation; services shall be provided at the facilities and hours of operation listed. This may include services at facilities other than their normal place of business, upon approval and as requested by the County.
- 4.1.2. Contractor shall provide services for the CX3 projects which shall be conducted in qualified neighborhoods as determined by the County. CX3 qualified neighborhoods are in census tracts where 50% of persons have household incomes of less than 185% of the Federal Poverty Guidelines.

**5. Definitions**

- 5.1. **Action Plan:** A sequence of steps that must be taken, or activities that must be performed well, for a strategy to succeed. An action plan has two major elements: 1) Specific tasks: what will be done and by whom. (2) Time Duration: when will it be done.
- 5.2. **Activity Tracking Form:** An online database to record activities and demographic information for nutrition education classes and activities from community events. This database is used for the NEOPB's SNAP-Ed program.
- 5.3. **CalFresh Eligible:** Persons who meet the criteria for participation in CalFresh as described in Federal legislation and regulations. Persons that participate in the formal CalFresh certification process and are determined eligible (e.g., CalFresh participants) clearly meet these criteria. Some persons who are eligible for CalFresh do not apply. These non-participating eligible individuals are not as easy to identify because they typically have not participated in a formal certification process. CalFresh eligible individuals are the recognized target audience for the NEOPB SNAP-Ed program.
- 5.4. **California Department of Public Health (CDPH):** The State of California agency responsible for the administration of the federally funded SNAP-Ed program.
- 5.5. **Census Tracts:** Small, relatively permanent geographic entities within counties or the statistical equivalent of counties. Generally, census tracts have between 2,500-8,000 residents and boundaries that follow visible features.
- 5.6. **County of San Diego Work Plan (previously called Project Synopsis):** This is a document listing census-approved sites for the NEOPB SNAP-Ed program. Annually, the program qualifies sites for nutrition education and community events with state program managers based on approved low-income

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census tracks at or below 185% of the federal poverty level. Nutrition education classes and community events can only occur at these qualified sites.

- 5.7. **Direct Education:** Nutrition education training classes provided to unduplicated participants, which are accompanied by a demographic survey for each participant. Direct education consists of three types of trainings as outlined in Paragraph 3.2.1.
- 5.8. **Federal Poverty Level (FPL) or Poverty Guidelines:** The set minimum amount of gross income that a family needs for food, clothing, transportation, shelter and other necessities. In the United States, this level is determined by the Department of Health and Human Services. Read more:  
<http://www.investopedia.com/terms/f/fpl.asp#ixzz2A9yA4g1t>  
See Poverty Guidelines at <http://aspe.hhs.gov/poverty/12poverty.shtml>. An administrative version of the federal poverty measure, issued annually by the U.S. Department of Health and Human Services (DHHS) in the Federal Register. Sometimes referred to as the Federal Poverty Level, these guidelines are often used to set eligibility for certain programs (<http://aspe.hhs.gov/poverty/index.shtml>).
- 5.9. **Healthy Food:** Supports health and, to the maximum extent possible, is fresh and minimally processed. Healthy food should be accessible and affordable to everyone, and ideally grown locally and sustainably.
- 5.10. **Indirect Education:** The distribution of information and resources that are designed to increase public awareness of SNAP-Ed and/or increase awareness and knowledge of food, dietary quality, food security, food safety, and food resource management/shopping behaviors. Indirect education includes any mass communications, public events and materials distribution that are not part of direct education efforts. The participants receiving indirect education are those receiving less than 15 minutes of instruction and/or those for whom age, gender, race/ ethnicity cannot be collected.
- 5.11. **Impact-Outcome Evaluation (IOE):** Impact and outcome evaluation both involve the assessment of intervention effects. Impact evaluation involves collecting data from a control or comparison group to examine changes in measures over time, in comparison to changes observed among intervention participants. Outcome evaluation examines changes over time among intervention participants, without a control or comparison group. Ideally, for either an impact or an outcome evaluation, data is available to examine changes over time among intervention participants by demographic characteristics and service dosage.
- 5.12. **Nutrition Education and Obesity Prevention Branch (NEOPB) SNAP-Ed Program:** A state program under the California Department of Public Health whose mission is to create innovative partnerships that empower low-income Californians to increase fruit and vegetable consumption, physical activity, and food security with the goal of preventing obesity and other diet related chronic diseases. This program was formerly known as the Network for a Healthy California.
- 5.13. **Nutrition Education:** A set of learning experiences designed to facilitate the voluntary adoption of healthy eating and other nutrition-related topics.
- 5.14. **Outreach:** Providing information or assistance to individuals who might be eligible for SNAP in order to help them make an informed decision whether or not to apply for the program. The NEOPB SNAP-Ed Program does not provide outreach, but promotion for the SNAP program.
- 5.15. **Policy, System and Environmental Change:** A sustainable change that may include a policy (written statement of organizational position, decision or course of action); a system (changes in organizational procedures); or an environment (physical, observable changes in the built, economic, and/or social environment).
- 5.16. **SNAP-Ed:** The Supplemental Nutrition Assistance Program (SNAP) plays a vital role in helping to improve nutrition in the U.S., particularly among low income children and adults. SNAP is a federal program that provides eligible low-income households with nutrition benefits to ensure that they have access to an adequate diet. NEOPB SNAP-Ed program provides nutrition and physical activity education

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services and Communities of Excellence (CX3) community engagement projects to eligible and potentially eligible CalFresh populations, leveraging and aligning resources and opportunities through the *Live Well San Diego*, Strategy for Building Better Health, the Childhood Obesity Initiative, the Healthy Works/Communities Putting Prevention to Work Centers for Disease Control grant and the Community Transformation Grant.

The goal of NEOPB SNAP-Ed program is to improve the likelihood that persons eligible for SNAP will make healthy food choices within a limited budget and choose physically active lifestyles consistent with the current Dietary Guidelines for Americans and US Department of Agriculture food guidance. For more information regarding the national SNAP-Ed program, please visit the USDA's website and review current the USDA SNAP-Ed Guidance, Manual and Templates: <http://snap.nal.usda.gov/national-snap-ed/snap-ed-plan-guidance-and-templates>

**6. General Requirements for Service Delivery**

- 6.1. Contractor shall include all provisions of this General Requirement Section in all agreements with subcontractors.
- 6.2. Allowable and Unallowable Purchases: Contractor shall purchase only allowable items for the SNAP-Ed program as detailed within the California Department of Public Health's (CDPH) SNAP-Ed Allowable and Unallowable Costs Guide. This guide can be found on the CDPH NEOPB website at: <http://www.cdph.ca.gov/programs/cpns/Pages/LHDInitiative.aspx> or can be provided by request from the County.
- 6.3. Cost reimbursement: Contractor shall provide cost reimbursement budgets for the NEOPB SNAP-Ed program. Fixed price and pay for performance contracts are not allowed in CDPH's NEOPB SNAP-Ed program.
- 6.4. Time Reporting: Contractor staff working less than 100% of time on NEOPB SNAP-Ed program activities shall provide bi-weekly time logs while charging to the project. All staff devoting 100% of time on NEOPB SNAP-Ed program activities will provide a copy of the duty statement each year and also the semi-annual certificate of activity two times per year. Expenses are to be based on actual time and actual salary rate per employee. These templates can be downloaded from the following link:  
<http://www.cdph.ca.gov/programs/cpns/pages/weeklytimelogs.aspx>
- 6.5. State Mandatory Annual Training: Contractor shall complete the State mandatory annual Civil Rights training for all NEOP funded staff and subcontractors on an annual basis and within each Federal Fiscal Year cycle period. Contractor shall have a process in place to collect and track annual completion rates for all NEOP funded staff and subcontractors. Contractor shall inform new staff of the requirement and remind current staff and subcontractor to complete the training annually. Contractor shall submit staff's completed Certificate of Completion with full name and date and saved Power Point pdf to County by September 15<sup>th</sup> annually. The training can be downloaded from the *NEOPB Training Resources* webpage under the Training section of the NEOPB website:
  - 6.5.1. <http://www.cdph.ca.gov/programs/CPNS/Pages/default.aspx>
  - 6.5.2. Click on the link for the Annual Civil Rights Training PowerPoint.
  - 6.5.3. Follow training instruction on Slide 3 and follow instructions on the last slide to print and retain a Certificate of Completion for record keeping.
- 6.6. The NEOPB SNAP-Ed program is funded based on the Federal Fiscal Year (FFY) schedule, which starts on October 1 and ends on September 30 annually. All activities for the NEOPB SNAP-Ed program shall be completed by September 30, 2016. The County will not pay for the costs of activities incurred after September 30, 2016.



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- 6.6.1. The NEOPB SNAP-Ed program under this contract consists of four (4) years of service. FFY 13 is April 1, 2013 to September 30, 2013; FFY14 is October 1, 2013 to September 30, 2014; FFY15 is October 1, 2014 to September 30, 2015; FFY16 is October 1, 2015 to September 30, 2016.
- 6.7. Other Requirements: NEOPB SNAP-Ed program exhibits and contracting documents to be provided by County and required by the USDA.
- 6.7.1. **Exhibit D (F) - Special Terms and Conditions:** CDPH document providing provisions requiring strict adherence to various contracting laws and policies.
- 6.7.2. **Exhibit E - Additional Provisions:** CDPH's information on: 1) additional incorporated documents, 2) cancellation/termination; and 3) avoidance of conflicts of interest by Contractor.
- 6.7.3. **California Department of Public Health Information Systems Security Requirements for Projects (ISO/SR1):** This document provides the minimum security requirements, mandated by the Information Security Office (ISO) from projects governed and/or subject to the policies and standards of the California Department of Public Health (CDPH). Projects that intend to deploy systems/applications into the Department's system infrastructure or will consume Department information system services are also subject to these minimum security requirements. Read more at:<http://www.cdph.ca.gov/programs/cpns/documents/network-pl-08-02-dph-iso-project-requirements.pdf>.
- 6.7.4. **State Program Guidelines:** Contractor shall abide by the state program guidelines per the FFY15 Supplemental Nutrition Assistance Program Education Guidance Manual and also the information contained in the online guidelines manual on the CDPH NEOPB website. Read more at:<http://www.cdph.ca.gov/programs/cpns/Pages/LHDInitiative.aspx>
- 6.7.5. **State Program Letters:** CDPH NEOPB Program letters identifying program specifics. Read more at: <http://www.cdph.ca.gov/programs/cpns/Pages/ProgramLetters.aspx>
- 6.8. Contractor shall participate in regularly scheduled County Nutrition Action Plan (CNAP) meetings as directed by the County. Contractor shall attend a minimum of four meetings per year.
- 6.9. **Healthy Working Environments:**
- 6.9.1. Contractor is encouraged to demonstrate a commitment to employee health and wellness through provision of healthy working environments to include, but not be limited to, smoke-free workplaces, healthy food and beverage options, lactation accommodations, physical activity opportunities, and other key wellness activities.
- 6.9.2. Contractor is encouraged to send the County copies of any existing policies the contractor has adopted regarding healthy working environments to include, but not be limited to, smoke-free workplaces, access to and promotion of healthy foods and beverages, lactation accommodations, and physical activity opportunities. The County will compile the wellness policies, identify best practices, and will contact Contractor to request permission to share the policies, or a portion thereof, as a best practice.
- 6.9.3. Contractor shall ensure all facilities utilized for services under the contract are in conformance with the (California) Labor Code specifically relating to smoking in enclosed workplaces (Labor Code Section 6404.5). Additionally, Contractor is encouraged to support and establish smoke-free environments.

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**7. Specific Requirements for Service Delivery**

7.1. Nutrition Education Program: Contractor shall perform the following NEOPB SNAP-Ed related activities:

7.1.1. Identify the nutrition education needs of the target population and coordinate with the registered dietitian and other County staff as determined by the County.

7.1.1.1. Contractor shall provide assistance and support to County staff as necessary in conducting one policy, system or environmental change (PSE) at a school site as designated by the County.

7.1.1.1.1. Contractor shall assist the registered dietitian in developing and implementing a Healthy School Action Plan to implement the policy, system, or environmental change at designated school site. Action Plans shall be due to the County for review and approval by February 28, 2015 and by February 28 each year. Action Plans may include, but are not limited to:

7.1.1.1.1.1. Copy of School or District Wellness Policy, other available nutrition policies, and list of approved nutrition education resources

7.1.1.1.1.2. Roles and responsibilities of stakeholders, including registered dietitian, nutrition educator(s), school staff and students

7.1.1.1.1.3. Schedule and timeline of activities. Activities may include, but are not limited to:

7.1.1.1.1.4. Implementing marketing strategies to increase healthier food selection and consumption.

7.1.1.1.1.4.1. Strategies may include but are not limited to: *Smarter Lunchroom Movement* materials, garden-based nutrition education, physical activity integration, food safety, cooking lessons, food demonstration instructions, model teaching strategies, lessons, and best practices.

7.1.1.1.1.5. Support implementation of salad bars at school sites.

7.1.1.1.1.6. Support implementation of healthy food procurement policies in vending machines, fundraising activities, and school events.

7.1.1.1.1.7. Promote implementation of healthy food and beverage standards for competitive foods at schools and after school program sites.

7.1.1.1.2. Contractor shall submit quarterly report on the Action Plan to the County with additional next steps 15 days prior to the end of each quarter.

7.1.1.1.3. Contractor shall submit a summary of intervention activities and completed activities in the quarterly report.

7.1.1.2. Contractor shall attend a minimum of two (2) of the following:

7.1.1.2.1. A minimum of one (1) of the events shall be a meeting with the Associated Student Body (ASB) each contract year;

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- 7.1.1.2.2. The second event shall be an event or meeting at the IOE intervention school, such as: Back-to-School night, health fair, or Parent Teacher Student Association (PTSA) meetings.
- 7.1.2. Complete County-approved NEOPB SNAP-Ed curriculum training.
- 7.1.3. Provide all classes at County-approved site locations, which are detailed on the County of San Diego Work Plan and the current site listing provided by the County.
- 7.1.4. Provide prescreened site locations currently not on preapproved list to County staff on an as needed basis using the web-based Geographic Information System (GIS) tool provided by the County.
- 7.1.5. Conduct nutrition education classes, which are considered direct education. Lessons shall be skill-based nutrition education lessons/activities integrated with topics such as but not limited to cooking activities, label reading, etc. Each class shall use NEOPB-approved materials and shall follow current Dietary Guidelines for Americans.
- 7.1.6. Prepare for classes, which include but are not limited to organizing and determining training materials, recruitment of participants, collecting assessment survey data, and purchasing and preparing food samples.
- 7.1.7. Coordinate with County staff to collect and report classes on a weekly basis using a template or online data entry system provided by the County. Data reported shall include but are not limited to training locations, participant demographic data, participant numbers and food costs.
- 7.1.8. Collect and submit to the County a training documentation packet per training on a weekly basis, which shall consist of class cover sheet, sign-in sheets, demographic surveys, class knowledge surveys, pre and/or post surveys exclusively for the 5-class series, and a training summary. The County will provide a template for the training packet documentation.
- 7.1.9. Participate in regularly scheduled nutrition education trainings provided by the County to review lesson plans and feedback and questions from participants to ensure quality nutrition education is being taught.
- 7.1.10. Participate in bi-monthly County Nutrition Assistance Program (CNAP) meeting facilitated by the County.
- 7.1.11. Participate in a minimum of one and a maximum of two (2) community events per month as directed by the County. Events may include, but are not limited to:
- 7.1.11.1. Fruit and Veggie Day
- 7.1.11.2. Juneteenth
- 7.1.11.3. Latino Health Awareness Month
- 7.1.11.4. Rethink Your Drink Campaign
- 7.1.11.5. *Live Well San Diego* Regional Forum Events
- 7.2. Food Handler Card
- 7.2.1. Contractor shall ensure that the nutrition educator providing the NEOPB SNAP-Ed related activities maintain a valid San Diego County approved Food Handler Card while actively providing NEOPB SNAP-Ed activities.
- 7.2.2. Contractor shall ensure that the nutrition educator will attend a food safety presentation by the NEOP SNAP-Ed registered dietitian and pass a food handler exam upon hire or when food handler card must be renewed.
- 7.2.2.1. Information for obtaining the Food Handler Card and the list of approved schools are available at: <http://www.sdcountyfoodhandlers.org>. Please note: If contractor chooses to

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obtain the Food Handler's card from the approved list of schools, this may require a fee for which the contractor will be responsible.

**7.3. Communities of Excellence (CX3):** Contractor shall perform the following CX3 related activities:

- 7.3.1. Provide a County-approved venue for resident training and meetings for the CX3 project(s).
- 7.3.2. Assist in conducting community assessments as they relate to the CX3 project(s) from October 1, 2014 to September 30, 2016 as directed by the County.
  - 7.3.2.1. Contractor shall assist in prioritizing, determining and implementing community improvement project(s) that reflect regional Action Plans, and planning for sustainability. Action Plan projects may include, but are not limited to:
    - 7.3.2.1.1. Community Agriculture Planning Projects to improve access to healthy food through city policies.
    - 7.3.2.1.2. Community/school gardens
    - 7.3.2.1.3. Safe routes to healthy places/ Active Transportation
    - 7.3.2.1.4. Retail corner store conversions.
  - 7.3.2.2. Contractor shall develop, in coordination with HHSA Regional Health Promotion staff and other County staff one project Action Plan based on the community improvement projects and submit to the County for review and approval by February 28 of each year. The plan shall incorporate project details and include, but is not limited to the following:
    - 7.3.2.2.1. Roles and responsibilities of stakeholders
    - 7.3.2.2.2. Schedule/timeline of activities
    - 7.3.2.2.3. Intergenerational structure, if applicable
    - 7.3.2.2.4. Destination and usage of allowable purchases, such as approved NEOPB SNAP-Ed educational materials and curriculum
    - 7.3.2.2.5. Sustainability plan for projects
  - 7.3.2.3. Contractor shall implement the County approved Action Plan within 10 business days after the plan is approved.
  - 7.3.2.4. Contractor shall submit progress on the Action Plan on a quarterly report to the County with additional next steps 15 days prior to the end of each quarter.
- 7.3.3. Support outreach to decision makers and key stakeholders on educational presentations regarding the CX3 findings and resident-led efforts from the Action Plan.
- 7.3.4. Identify and provide assistance on funding applications that support CX3 priorities, including increasing access to healthy food and physical activity opportunities.

**8. Data Collection and Reporting Requirements**

- 8.1. Nutrition Education Program: Contractor shall perform data collection and shall provide reports to the County in a format provided by the County, pursuant to the following:
  - 8.1.1. Weekly Reports: Contractor shall coordinate with County Public Health Services designee to collect and report classes on a weekly basis on a template provided by the County.
    - 8.1.1.1. Number of classes
    - 8.1.1.2. Training locations
    - 8.1.1.3. Participant Numbers
    - 8.1.1.4. Food Costs

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- 8.1.2. Contractor shall enter all program activities in the online Activity Tracking Form (ATF) as directed by County Public Health designee. County will provide training annually and on as-needed basis. The reports shall include, but are not limited to:
- 8.1.3. Training Documentation Packet: Contractor shall collect and submit to the County a training documentation packet on a weekly basis, which shall consist of at a minimum:
  - 8.1.3.1. Sign-in sheets for all classes and/or teacher verification form
  - 8.1.3.2. Demographic cards/surveys
  - 8.1.3.3. Pre-surveys and post surveys for the 5-class series
  - 8.1.3.4. Copies of recipes
  - 8.1.3.5. Receipts for food costs
- 8.1.4. Monthly Progress Report: Contractor shall submit a monthly Report to the County by the 10<sup>th</sup> of each month. The report shall include but is not limited to:
  - 8.1.4.1. Summary of direct education
  - 8.1.4.2. Summary of indirect nutrition education
  - 8.1.4.3. Bi-weekly time logs for staff conducting SNAP Ed activities less than 100% of their time.
- 8.1.5. Quarterly Report
  - 8.1.5.1. Summary of intervention activities and completed activities at the IOE school.
    - 8.1.5.1.1. Copy of any policies the school implemented as a result of the project.
  - 8.1.5.2. Progress on CX3 Action Plan and additional next steps
- 8.2. Contractor shall participate in regularly scheduled nutrition education trainings and/or meetings as provided by the County to review lesson plans, feedback and questions from participants to ensure that quality nutrition education is being provided.
- 8.3. Nutrition Education Program and CX3 Program:
  - 8.3.1. Contractor shall provide monthly invoices by the 10<sup>th</sup> of each month. Documentation shall be available for all allowable costs listed on monthly invoices at the County's request and at the time of in-depth invoice validations as determined by the County. Examples of documentation are timesheets, general ledgers, payroll registers, receipts, and mileage reports, etc. Contractor shall require all subcontractors to follow these same guidelines.
  - 8.3.2. Contractor shall complete a bi-weekly time log for all staff working less than 100% of time on Network activities and submit to the County (CAP) attached to monthly invoices.

If staff is working on any activities outside of NEOPB SNAP-Ed program nutrition education services they will submit bi-weekly time logs. All original bi-weekly time logs should be received no later than one month after activities. All staff devoting 100% of time on NEOPB activities shall submit a copy of the duty statement once and shall also submit a copy of the semi-annual certificate of activity two times per year. Expenses shall be based on actual time and actual salary rate per employee. These templates can be downloaded from:

<http://www.cdph.ca.gov/programs/cpns/pages/weeklytimelogs.aspx>. Contractor shall require all subcontractors to follow these same guidelines.

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**PAYMENT SCHEDULE**

**Exhibit C – CY2015**  
**January 1, 2015 – December 31, 2015**  
**Fixed Price**

(1) ITEM	(2) PWS REFERENCE	(3) PAYPOINT DESCRIPTION	(4) UNIT	(5) UNIT COST	(6) NUMBER OF UNITS	(7) EXTENDED AMOUNT
1	3.2.1.1	Employment Placement	Placement (Participant)	\$221.01	125	\$27,626
2	3.2.1.2	Employment Retention	Participant	\$144.01	119	\$17,137
3	3.2.1.3	Employment Upgrades	Upgrade (Participant)	\$415.01	30	\$12,450
4	3.2.1.4	Employment Supports	Support	\$475	125	\$59,375
5	3.2.2	CSBG Tax Preparations	Completed Tax Returns	\$126	500	\$63,000
6	3.2.3	Economic Asset Enhancement	Participant	\$210.04	50	\$10,502
7	3.2.4.1	EA Food Distribution	Food Packet	\$85	425	\$36,125
8	3.2.4.2	EA Referrals	Referral (Resulting in 1 or more bed nights)	\$33.02	95	\$3,137
9	3.2.5	Access to Benefits	Application Assistance	\$215	150	\$32,250
	<b>SUB-TOTAL</b>					<b>\$261,603</b>

**Cost Reimbursement**

10	7.9	Shelter Services	Voucher	\$29,250
	<b>TOTAL</b>			<b>\$290,853</b>

**Total Contract price cannot exceed \$290,853**

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**FOR NEOPB SNAP-ED SERVICES**  
**EAST REGION**  
**EXHIBIT C-1 PAYMENT SCHEDULE AND BUDGET**

**1. Compensation**

Payment for these services described in Exhibit A-1 Statement of Work is a cost reimbursement. The cost reimbursement period is January 1, 2014 through September 30, 2016. After County review and acceptance of original monthly invoice, County will pay in accordance with the attached contract Budget for the cost reimbursement period. This project is funded by a federal SNAP-Ed grant, Catalog of Federal Domestic Assistance (CFDA) # 10.561.

**2. Payments**

All requests for payment are subject to County review and acceptance of deliverables and submitted documentation at the time of invoice. Pending any adjustments by the Contracting Officer's Representative (COR), each invoice approved and paid shall constitute full and complete compensation to the Contractor for the invoice.

**2.1** January 1, 2015 to December 31, 2015 (Option Year 2), NEOPB SNAP-Ed Nutrition Education funds: Total payments cannot exceed contract price of \$60,395. (See Table 1 below)

**2.2** January 1, 2015 to December 31, 2015 (Option Year 2), NEOPB SNAP-Ed CX3 Funds: Total payments cannot exceed contract price of \$20,000. (See Table 2 below)

**3. Invoices**

**3.1** Contractor shall submit monthly invoices to the County by the tenth (10<sup>th</sup>) of the month following the deliverables. Invoice template will be provided by the County.

**3.2** Invoices shall be submitted via e-mail to the COR, or to the following address:

Community Action Partnership  
Attn: Payment Processing  
1255 Imperial Avenue, Suite 743, MS W-294  
San Diego CA 92101

**3.3** Invoices shall contain the following certification:

*I certify, under penalty of perjury under the laws of the State of California, that no employee or entity providing services under the terms and conditions of this contract is currently listed as excluded on the federal System for Award Management (SAM), the federal Health and Human Services Office of Inspector General List of Excluded Individuals/Entities (LEIE), or the State of California Medi-Cal Suspended and Ineligible list.*

*I also certify that the above deliverables and/or services were delivered and/or performed specifically for this contract in accordance with the terms and conditions set forth therein.*

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**4. Payment Schedule and Line Item Budget – See attached.**

Exhibit C Funding Total	\$290,853
Exhibit C1 Funding Total	\$80,395
Exhibit C2 Funding Total	-0- Contract period ended 9/30/2014
Grand Total	\$371,248*

**\* This is the summary of Exhibit C, C1, and C2.**



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**EXHIBIT C-1 PAYMENT SCHEDULE AND BUDGET**

**Cost Reimbursement Budget**  
**January 1, 2015 to December 31, 2015 - CDPH**

**CONTRACT BUDGET – TABLE 1**

<b>CONTRACTOR:</b>	Home Start, Inc.		
<b>CONTRACT PERIOD:</b>	January 1, 2015 - December 31, 2015		
<b>AMENDMENT PERIOD:</b>	Revised 4/2015		
<b>CONTRACT NO.</b>	544430		
<b>FUNDING SOURCE:</b>	CDPH		
<b>Prepared by:</b>	Bryce Guthrie	<b>Phone#:</b>	619-692-0727 xt.147

<b>BUDGET LINE ITEM</b>	<b>PROGRAM(S)</b>		
	<b>SNAP-Ed</b>		<b>TOTAL</b>
<b><u>PERSONNEL:</u></b>			
*Wages & Salaries	34,645		34,645
Fringe Benefits	10,323		10,323
<b>Personnel Subtotal:</b>	44,968	-	44,968
<b><u>NON-PERSONNEL:</u></b>			
* Consultant/Contract Services	-		-
Mileage	765		765
Transportation	-		-
Insurance	416		416
Space Cost & Rental	3,480		3,480
Consumable Supplies	2,273		2,273
* Equip, Rental/Lease/Purchase (Including minor equipment)	-		-
Utilities/Telephone	660		660
* Indirect Costs	6,813		6,813
* Other Costs	1,020		1,020
<b>Non-Personnel Subtotal:</b>	15,427	-	15,427
<b>Total Budget:</b>	60,395	-	60,395

**LEGEND**

\* May require prior approval, please contact COR.

**COUNTY CONTRACT NUMBER: 544430**  
**COUNTY OF SAN DIEGO, HEALTH AND HUMAN SERVICES AGENCY**  
**AGREEMENT WITH HOME START, INC.**  
**FOR NEOPB SNAP-ED SERVICES – EAST REGION**  
**EXHIBIT C-1 PAYMENT SCHEDULE AND BUDGET**

**Cost Reimbursement Budget**  
**January 1, 2015 to December 31, 2015 - CDPH and Other Funding**

**CONTRACT BUDGET – TABLE 2**

<b>CONTRACTOR:</b>	Home Start, Inc.
<b>CONTRACT PERIOD:</b>	January 1, 2015 - December 31, 2015
<b>AMENDMENT PERIOD:</b>	Revised 4/2015
<b>CONTRACT NO.</b>	544430
<b>FUNDING SOURCE:</b>	CDPH
<b>Prepared by:</b>	Bryce Guthrie Phone#: 619-692-0727 xt.117

BUDGET LINE ITEM	PROGRAM(S)		
	CX3		TOTAL
<b><u>PERSONNEL:</u></b>			
*Wages & Salaries	-		-
Fringe Benefits	-		-
<b>Personnel Subtotal:</b>	-	-	-
<b><u>NON-PERSONNEL:</u></b>			
* Consultant/Contract Services	20,000		20,000
Mileage	-		-
Transportation	-		-
Insurance	-		-
Space Cost & Rental	-		-
Consumable Supplies	-		-
* Equip, Rental/Lease/Purchase (Including minor equipment)	-		-
Utilities/Telephone	-		-
* Indirect Costs	-		-
* Other Costs	-		-
<b>Non-Personnel Subtotal:</b>	20,000	-	20,000
<b>Total Budget:</b>	20,000	-	20,000

**LEGEND**

\* May require prior approval, please contact COR.